



Report to the Commissioners

Area IX Agency on Aging, Flathead County

November 19, 2018

Prepared by Lisa Sheppard, Director

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2017 actuals
FY 2018 annual targets
FY 2018 actuals
FY 2018 actuals as a percentage of annual targets
FY 2018 actuals as a percentage of FY 2017 actuals
FY 2019 actuals to date
FY 2019 annual targets
FY 2019 actuals as a percentage of FY 2019 annual targets

The general target is 33.33% for FY 2019, July 1, 2018-October 31, 2018, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

Data to note:

- **The # of unduplicated clients receiving Independent Living Services** is almost at target for the year as all clients were counted as “new” in July. This measure was unavailable last month.
- **Outreach/Education** efforts continue above target for the year due to BEC grant related outreach.
- **Meals/Nutrition** - Total meals served are now on target for the fiscal year and on par with last year.
- **Transportation**
 - Total rides are almost 11% above target for the year due to increases in non-GNP fixed route ridership and seasonal rides within Glacier National Park, despite early closures due to fires.
 - Excluding rides within GNP, we’ve provided 1,764 more rides than this time last year. In addition, we provided a record 9304 rides this month (non-GNP).
 - Rides on the previously underperforming Kalispell fixed route continue to grow on both the AM and PM runs.
 - Our Dial-A-Ride service, which now includes paratransit rides in Kalispell plus premium DAR rides in Evergreen and west of Kalispell, continues to provide about 10% fewer rides than last year when all DAR rides were paratransit rides related to the Kalispell/Evergreen fixed route. However, some passengers are now able to use the Evergreen Commuter instead.

- **Independent Living Services**

- The “unit of service” numbers are for September, when the target was 25%. We are on track for homemaker and below target for the other services. Staff continue to re-assess all IL clients and update service plans.

AOA Administration

Budget and Contracts

- We worked with Finance to prepare for and participate in the county’s annual audit. Both Eagle Transit 5311 and Glacier National Park Cooperative Agreement funds were selected for the single audit review.
- The FY 2019 DPHHS contract/budget is on the Commissioners’ agenda for review and approval today.
 - We continue to wait for confirmation from DPHHS regarding how much of the FY 2019 increase is from federal FY 2018 and how much is from federal FY 2019 so we can project for county/state FY 2020 and beyond.
 - We will complete and submit the October financial reports to DPHHS this week.

Building

- Nothing to report.

HR/Staff Development

- We have one open position: Cook (1.0 FTE). This position is proving very difficult to fill, so we are exploring alternatives.
- We are looking at using some of the federal funding increase to add a part or full-time Resource Specialist.

State/Federal/Legislative Issues

- It continues to appear the FY 2019 federal budget will maintain the increases for aging services achieved in FY 2018, including nutrition, IIB supportive services, caregiver support, preventive health and SHIP.
- Area Plan on Aging
 - The draft of the new 4-Year Area Plan on Aging is due to DPHHS March 15, 2019.
 - A cornerstone of the Plan is incorporating older adult and general public input. We’ve conducted two focus groups so far, one with the AOA Advisory Council and one with the Age-Friendly Flathead Steering Committee. We will hold at least one public meeting in January to get additional feedback.
 - The federal Administration on Community Living requires the plan focus on the following four areas:
 1. Older Americans Act Core Programs
 2. Specific Programs: ADRCs, Evidenced-based Disease Programs and SHIP/SMP
 3. Participant-Directed/Person-Centered Planning
 4. Elder Justice (Ombudsman, Legal Services, Adult Protective Services)
- M4A
 - Lisa completed her term as President in October and does not hold an officer position at this time.
 - Lisa assisted in orienting the new Association Manager to the organization.

- Lisa continues to participate on a subcommittee to advise the state on redesigning the Legal Services Developer program that provides federally mandated legal advice and services to older adults.

AOA Advisory Council

- The Advisory Council did not meet in October, but did meet on November 8th to provide input for the new 4-year Area Plan on Aging.
- Members formed an advocacy committee to provide education and information to legislators in the upcoming Montana state legislative session.
- The committee formed to work on the creation of a 501(c)(3) for fundraising is seeking a chair and additional members.

Outreach/Education/Media

Note: Transportation related outreach is noted in the Eagle Transit section below.

- 10/1/18, "A Golden Anniversary," Flathead Beacon, 28,000
- 10/3/18, BEC Education/LIEAP application assistance at senior apartment, 11
- 10/8/18, monthly interview on KGEZ, 15,000
- 10/9/18, participation on City of Kalispell Trail Crew, 20
- 10/11/18, participated in Veterans Service Providers Meeting, 20
- 10/16/18, participated in Community Health Needs Assessment, 20
- 10/18/18, facilitated focus group for Area Plan on Aging with Age-Friendly Flathead Steering Committee, 9
- 10/23/18, Medicare 101 class, 13
- 10/25/18, BEC Education and Outreach Event in Hungry Horse, 75
- 10/29/18, BEC Education and Outreach Event at Gateway Community Center, 20
- 10/30/18, Medicare 101 class, 13
- Multi-media promotion of Medicare 101 classes
- Multi-media promotion of BEC Outreach events

Age-Friendly Flathead

- Lisa attended the 2018 AARP Livable Communities Conference in North Carolina November 12-14.
- At the 10/18/18 meeting, members participated in a focus group to give input on the new 4-year Area Plan on Aging.

Eagle Transit

- Montana Department of Transportation (MDT):
 - Annual Transportation Coordination Plan (TCP), 5311 Application and Capital Request
 - The annual public input meeting is scheduled for December 13th from 4:00-6:00 at the South Campus conference room. Promotion will begin shortly.
 - The questionnaire for the new onboard survey is under development.
 - We anticipate notification of our federal funding allocation for FY 2020 in mid-December.
 - 5-Year Transportation Development Planning Grant
 - Staff and Planning Committee members traveled to Bozeman October 31st-November 3rd to meet with consultant David Kack and Streamline transit system staff to learn about their operations and how they might inform our planning process and recommendations.

- Staff continue to work with the City of Kalispell regarding permitting and installation of bus stop signs.
 - The final report is due to MDT by December 31st.
- We submitted FY 2019 quarterly financial, program and vehicle reports last week using MDT's new webgrants reporting system.
- Outreach/Education/Media/Special Events:
 - The KPAX commercial continues to run on the CW and on Channel 8 KAJ (CBS morning show, The Price is Right and Jeopardy/Wheel of Fortune.
 - As required by federal regulations, a monthly ad ran in the Daily Inter Lake in August and September.
 - Staff promoted the October TAC meeting.
- Operations:
 - We received two new 13-passenger buses approved in FY 2018.
- Transportation Advisory Committee (TAC)
 - The next TAC meeting will be January 3rd. Members will provide their input to the annual Transportation Coordination Plan. The TAC will vote on the TCP, 5311 application and capital request at the February 7th meeting.
- Glacier National Park
 - The annual CA modification and new budget will be available for Commissioner review and approval shortly.

Nutrition

- The annual Thanksgiving meal was served on Friday, November 16th. There were 210 diners at AOA. Total meal numbers will be available next month.

I & R/Assistance/Ombudsman/Independent Living Services

- Volunteer Program
 - We are updating our volunteer program policies and procedures/processes and recruiting new volunteers to assist with reception and I&A duties in the office.
- Veteran Directed HCBS Program
 - Approximately 25 active veterans continue to be served at any given time.
 - Area VI has suspended enrollment of new veterans temporarily to ensure staff have adequate time to attend to current participants and reimbursements are being received in a timely manner from the VA.
- Independent Living Services:
 - We continue to have a waiting list for new clients until all existing clients are re-assessed and we've confirmed their service levels.
 - We are continuing to offer services on a donation basis to those clients whom we have not yet visited for a re-assessment and Benefits CheckUp.
 - IT is assisting us with database modifications to allow for automated sliding fee scale billing.
- Medicare Open Enrollment
 - Open Enrollment is October 15-December 7. Appointments are almost full.
 - We are offering two additional Medicare 101 classes during Open Enrollment as a way to provide information to more people who may be able to complete their own changes online without a one-on-one appointment.

- Benefits Enrollment Center grant
 - The current grant expires December 31st. We applied for another one-year grant for \$35,000 to begin in January, again partnering with the Area VI Agency on Aging, but have not yet heard whether we've been approved.
 - We continue to work with IT to create a new AOA website, which is part of the current BEC grant.
 - We recently conducted two very successful BEC outreach events, one in Hungry Horse in partnership with United Methodist Church of Columbia Falls and the other at Gateway Community Center in partnership with United Way.

Senior Mobile Home Repair

- The Advisory Board met on November 14th. The next meeting will be 12/12/18 at 10:00 am at Flathead Electric.
- Four projects were completed since the last report; 17 are in progress; 26 are on the waiting list.
- Donations pledged/received this fiscal year to date: Oro y Plata (\$10,000), Glacier Bank (\$2,500), Northwest Energy (\$5,000), BNSF (\$10,000), Soroptimists (\$3,000), Whitefish Credit Union (\$2,000)

Senior Centers - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- Lisa spoke about the need for a new Bigfork Community Center at the CDBG Annual Public Hearing at the Kalispell City Council chambers on November 15th. Lisa continues to communicate with the Community Center Board and Building Steering Committee members regarding next steps.
- We've negotiated a contract with a local nonprofit consultant, Ned Cooney, to provide the senior center boards with governance training (on the Commissioners' agenda today for review and signature).
- The Daily Inter Lake profiled Kalispell Senior Center Board President Steve Bicknell in their October 29th issue, "Kalispell Senior Center president reflects on life, faith, career."
- Status of repair requests:
 - The Whitefish Community Center roof was repaired. However, the construction of the building next door has caused significant damage to the building, including cracks in the foundation and broken water pipes.
 - Whitney continues to work with the North Valley Senior Center on their request for railing along the front porch and ramp and repairs to porch itself. The Center hopes to replace the porch with concrete instead of wood and so will wait until spring to start the project if approved.

November 2018 Report: Performance Measures Tables - October 2018 stats (FY 2019)

33.33%

MEASURE	FY 2017 Actuals	FY 2018 Target	FY 2018 Actuals	FY 2018 % of Target	FY 2018 as % FY 2017	Oct	Total Last Report	Total/Avg. to Date	FY 2019 Target	% Target
# Receiving Independent Living Services	178	233	110	47%	62%	not yet available	93	93	98	95%
# Receiving Meals on Wheels	470	465	374	80%	80%	23	239	262	465	56%
# Seniors Receiving Congregate Meals	1,785	1,000	1,404	140%	79%	144	759	903	1,200	75%
# Eagle Transit DAR Unduplicated Riders	401	500	331	66%	83%	28	218	246	450	55%
% of Service Recipients at Moderate to High Risk of Institutionalization	89%	88%	92%	105%	103%	89%	89%	89%	88%	101%
Per Meal Cost of Nutrition Services	\$6.89	\$6.75	\$6.29	93%	91%	\$5.76	\$5.36	\$5.76	\$7.00	82%
% Overall Satisfaction with AOA Services from Annual Survey	N = 99%, IL = 96%	95%	N=97% IL=90%			N/A	N/A		95%	
Maximum annual number of transportation complaints	30	36	12	33%	40%	0	0	0	36	0%
WORKLOAD INDICATOR	FY 2017 Actuals	FY 2018 Target	FY 2018 Actuals	FY 2018 % of Target	FY 2018 as % FY 2017	Oct	Total Last Report	Total/Avg. to Date	FY 2019 Target	% Target
Outreach/Education/Media						Oct				
Public Outreach/Education/Media Efforts	123	120	116	97%	94%	13	34	47	120	39%
Nutrition						Oct				
Total Meals	82,428	79,000	80,639	102%	98%	7,104	18,957	26,061	80,000	33%
MOW	49,695		47,409	N/A	N/A	4,130	10,892	15,022		
Congregate	32,733		33,230	N/A	N/A	2,974	8,065	11,039		
Nutritional Assessments Conducted	2,424	1,550	1,846	119%	76%	202	691	893	2,000	45%
Transportation						Oct				
Total Ride Count	85,305	90,000	99,104	110%	116%	9,304	30,279	39,583	90,000	44%
Dial-A-Ride Count	30,025	30,000	31,645	105%	105%	2,333	7,136	9,469	30,000	32%
City, Commuter and Other Ride Count	55,280	60,000	67,459	112%	122%	6,971	23,143	30,114	60,000	50%
Eagle Transit Outreach/Special Events	40	15	42	280%	105%	3	10	13	24	54%
Information and Referral/Assistance						Oct				
Info and Referral/Assistance Contacts	17,523	18,000	19,429	108%	111%	1,431	5,345	6,776	18,000	38%
Independent Living			93%			Sept				19%
Homemaker Units of Service	784	2,500	2,005	80%	256%	103	226	329	1,324	25%
Escorted Transportation Units of Service	792	1,739	2,314	133%	292%	71	167	238	1,391	17%
Respite Units of Service	992	2,468	2,079	84%	210%	210	388	598	3,250	18%
Community Support/Senior Companion Units of Service	1,060	1,353	1,310	97%	124%	54	149	203	1,176	17%
Personal Care Units of Service	358	435	231	53%	65%	0	11	11	65	17%
Benefits Counseling						Oct				
Benefits Counseling Hours of Service	600	450	502	112%	84%	not yet available	148	148	450	33%
Ombudsman						Oct				
Ombudsman consults/cases opened	1034	1,100	1,250	114%	121%	122	366	488	1,100	44%